

**Event Information:**

Type of Entertainment: *(check applicable boxes)*

Breakfast
Lunch
Dinner
Light Refreshments
Other: (please describe)

Event Description: *(check applicable boxes)*

Cooperative Extension Public Education Meeting
Search/Interview Committee
Faculty/Staff meeting – (light refreshments only)
Administrative meeting directly concerned with the welfare of the University. Meals are an integral part of the business meeting and not for personal convenience.

Date of Event:

Business Purpose:

Number of Attendees:

Name/Description of Event & Audience:

Amount:

Account Number:

If available, please include the Aggie Expense or Check Request-Entertainment Reference Document #

**Pre-approval for the following exceptional entertainment event is requested:**

Event is for morale-building or recognition of UC employees or official UC volunteers\*

Event will include alcohol service (not an allowable use of state, federal or contract & grant funds), please attach permit

Event will include spouse or domestic partners of guests or host

Event will exceed the allowable per person amount as established by UC policy

Provide an explanation for the exceptional request:

Date:

County/Admin/Prog/Unit:

Originating Reference Doc #

Preparer Name:

Document # Number of pages attached:

Email Address:

**Approvals:** *I certify that the above is a true statement of the facts which justify the planned exceptional entertainment expenses.*

Host:

Director:

\_\_\_\_\_  
*(date)*

\_\_\_\_\_  
*(date)*

**APPROVED**

**DISAPPROVED**

BOC Director Review  
(as needed)

\_\_\_\_\_  
Controller/AVP Business Operations (Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
*(date)*

\_\_\_\_\_  
*Initials*

*Complete form, print, sign, & forward to the BOC to initiate approval from the ANR Controller/AVP Business Operations. Approved form will be returned to originating Requestor to be included with Aggie Expense Report or with the Check Request Entertainment Vendor Payment. \*See Page 2 for UC ANR Morale Building Guidelines*

Memo sent to all ANR Directors for distribution on behalf of Tu Tran - December 2022

**UC ANR use of funds for morale-building events and employee non-cash awards.**

Morale-building events include employee recognition receptions, annual academic/staff picnics, new employee receptions, and holiday gatherings. UC ANR funds may pay for or reimburse costs for meals or light refreshments associated with official employee morale building and appreciation activities that serve a University business purpose.

In keeping with UC wide policy, use of ANR funds is limited to \$22 per person for light refreshments. Morale-building events funded by ANR should be held on ANR property. Pre-approval for morale-building events is still required. We expect all directors and managers to exercise good judgment about individual and cumulative expenditures related to these activities and programs.

These restrictions for morale-building events apply to all ANR funds, regardless of fund type or source. These restrictions do not expire. We will continue to examine all uses of ANR funds, existing policies and procedures, and our current activities.

**Employee Non-Cash Awards** (i.e. Gift Cards):

Employee recognition awards should only be provided within an established recognition program (such as Spot Awards or STAR Awards) and based on objective criteria. These non-cash recognition awards should only be given for “exemplary performance” (i.e., a special project above and beyond the normal scope of an employee’s job).

Gift cards should not be purchased with ANR funds for distribution to employees as recognition for work within the normal scope of their employment; especially during the holidays as it will be considered taxable income (i.e. a bonus).

State funds (start-up, salary cost recovery, general program) or federal funds (program support/PDSL and general support/CEGS) cannot be used for either morale-building events or gift cards.

**Related UC Policies BUS-79, G-41 and G-46.**

Questions about these issues may be forwarded to the Business Operations Center (Su-Lin Shum, [sshum@ucanr.edu](mailto:sshum@ucanr.edu)) or the Controller’s Office (Robin Sanchez, [rgsanchez@ucanr.edu](mailto:rgsanchez@ucanr.edu)).